Tourism Development Framework for Scotland

Role of the planning system in delivering the visitor economy (Refresh 2016)
Cabinet Secretary Statement

1.0 Introduction

2.0 Development Framework to 2020

Improving the Customer Journey

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Providing Authentic Experiences

- Theme 5 – Nature & Activities
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- Theme 7 – Destinations, Towns & Cities
- Theme 8 – Business Events
- Theme 9 – Events & Festivals

3.0 Making it Happen
As Cabinet Secretary for Culture, Tourism and External Affairs, I am delighted to present and endorse the refreshed version of the VisitScotland Tourism Development Framework for Scotland.

Tourism is one of Scotland’s most important industries with its benefits and impacts reaching many other sectors of the Scottish economy. Sustainable growth in the visitor economy is a key plank of the National Tourism Strategy TS2020. This Framework will provide an important point of guidance for development planning authorities to help secure this growth.

The partnership formed to create this refreshed Framework alongside the work to produce a mid-term review of the national tourism strategy led by the Scottish Tourism Alliance emphasises the importance of collaboration between the private and public sectors.

We must all work together to make a positive contribution in the implementation of this Framework, turning fine words into real projects that will enhance the visitor experience. Equally important is the development of clear market demand evidence to support investment opportunities highlighted in the action plan section of the document.

On behalf of the Scottish Government I congratulate VisitScotland and all the national and local, public and private sector partners involved in the production of this refreshed Framework. I look forward to working with everyone involved in its creation to realise the full potential and ambition of Scotland’s tourism industry.

Fiona Hyslop,
Cabinet Secretary for Culture, Tourism and External Affairs

November 2016
1.1 Tourism is a key component of Scotland’s economy as demonstrated in its status as one of Scotland’s Growth Sectors. The country attracted over 14.5 million visitors in 2015, which generated £5 billion in overnight visitor spend. Further to this 127 million tourism day trips were taken in Scotland in 2014 with a total spend of £5 billion.

1.2 The sector is a major economic enabler contributing to the business base and employment levels across a wide range of geographies and demographics. There are 14,000 tourism related businesses (8% of all Scottish businesses) supporting over 196,000 jobs (9% of all Scottish employment) in Scotland.

1.3 A co-ordinated and concerted focus on investing in the areas of greatest opportunity will continue to help drive growth to 2020.

1.4 In response to this challenge, VisitScotland has published this – a refresh of the first Tourism Development Framework for Scotland…role of the planning system in delivering the visitor economy (the Framework Refresh). The Framework Refresh supports the national tourism strategy promoted on behalf of the industry by The Scottish Tourism Alliance – Tourism Scotland 2020, and the “natural, resilient place” theme of the spatial strategy in the third National Planning Framework.

PURPOSE OF THE FRAMEWORK

1.5 This Framework has been prepared to support the aim of increasing sustainable economic growth in the visitor economy being promoted by the planning system at the national level – Scottish Planning Policy and the National Planning Framework – and help development planning authorities (including strategic development planning authorities, local planning authorities and national park authorities) to develop their own strategies to grow the visitor economy in their local areas.

1.6 In addition to the main document Appendix 1 – Action Plans, contains a list of infrastructure and development projects supplied by a wide range of local and national stakeholders. These are projects which will commence, continue or be completed during the 3 year life time of the Framework (November 2016 – October 2019) and focus on improving the overall visitor experience.

1.7 The Framework recognises the need for greater focus on current partnership working between public and private sectors with VisitScotland supporting through an enabling role.

1.8 This Framework is not itself a specific commitment to expenditure by any local authority, Government agency or stakeholder. It will help inform the investment programmes of public agencies and infrastructure providers, as well as shaping planning policy for the Scottish planning system to realise development opportunities to 2020.
VISITOR ECONOMY

1.9 The visitor economy is the term given to the interaction in economic terms between visitor spend and the services which contribute to and benefit from this in Scotland.

1.10 It has at its core the tourism sector with its traditional areas of accommodation, activities, travel and attractions.

1.11 The Tourism Scotland 2020 strategy, has set a target of securing an annual visitor spend of between £5.5bn and £6.5bn to 2020 for overnight visitors – an increase of £1bn or more (at 2011 prices) over current performance. Support from the planning system is necessary to help deliver this target.

1.12 Using the wide range of data, survey results and industry insights, VisitScotland will provide forward demand projections for the main elements of the customer journey and by overlaying current supply data will identify potential product gaps.

1.13 Initially this “mapping and gapping” exercise will be carried out at a national, Scotland-wide level. Where robust local data is available it may be possible to provide regional and local perspectives.

**ACTION**

VisitScotland will develop a new mapping and gapping methodology to help provide economic and development planning authorities with future demand and product gap data to support opportunities for growth in the visitor economy. (Initially pilot projects will test the robustness of this methodology).

DELIVERING THE FRAMEWORK’S ACTIONS THROUGH CO-ORDINATING RELATIONSHIPS

1.14 The responsibility for the performance of the visitor economy lies across a range of organisations in both private and public sectors. In line with SPP, local authorities are encouraged as part of their business land audit process to take account of the contents of the Framework refresh to inform reviews of development plans.

1.15 The delivery of development opportunities often requires multi-agency collaboration, intensive project management support and the adoption of a pro-active approach to secure the necessary investment.

**MAXIMISING THE VALUE FROM INVESTMENT**

1.16 In recognition of the diminishing availability of funding from the public sector, the Framework has adopted an enabling approach to maximise benefits for infrastructure investment.

1.17 Most of the investment to deliver upgrades to existing business or establishing new businesses in the visitor economy will come from the private sector and more often from smaller businesses in rural locations. To help facilitate private sector investment, innovative funding propositions may be required.

1.18 The process to develop this document confirmed that obtaining planning permission remains a critical matter to securing investment. The actions recommended in this Framework Refresh seek to build confidence in securing planning permission, and releasing private sector finance.

1.19 Development opportunities need to be approached in a different and distinct way for projects in rural and island locations. Dependency on a more limited seasonal market and need for greater business diversification are key issues for businesses serving the rural and island markets.
1.20 At all times, understanding and supporting the specific needs and requirements of the business is at the core of realising the development opportunity irrespective of its location. It is critical that market demand evidence underpins development opportunities, irrespective of location. The approach outlined in SPP sets out clearly the preferred approach to rural development.

INFLUENCING THE PLANNING SYSTEM

1.21 Four years on from its original publication, the national tourism strategy TS2020 has been the subject of a mid-term review. Significantly, as part of a major prioritisation, “influencing investment” has been identified as a key driver of growth in helping to meet the strategy’s ambitious targets.

1.22 The Framework Refresh helps to inform statutory development plans about potential development opportunities. It promotes the need for a supportive policy framework and can act as a material consideration in the determination of planning applications for new and expanded facilities which form part of the visitor economy. It also provides assistance to local authorities as they work with community planning partners to take forward their Single Outcome Agreements.

1.23 Underlying the Framework is the support for the spatial strategy in The Third National Planning Framework.

1.24 Development plans which are attuned to the needs of the visitor economy are of particular significance in enabling Scotland to attract and secure further investment. The development framework for the visitor economy is set out in Chapter 2. It is presented by reference to the key elements in Tourism Scotland 2020’s strategy “Improving the Customer Journey and Providing Authentic Experiences”.

1.25 The visitor economy operates across a range of geographies and boundaries. The overall experience of our tourists and visitors is dependent on the quality of the overall customer journey.

1.26 The refresh process for this Framework highlighted the need for the development management process across Scotland to be more supportive to emerging tourism projects. In-line with the SPP, which includes a presumption in favour of development that contributes to sustainable development, decision making should fully recognise the economic factors associated with such projects.

COMPLIANCE WITH STATUTORY REQUIREMENTS

1.27 The Framework Refresh has been subject to a screening for Strategic Environmental Assessment (SEA). SEA is targeted at plans, programmes and strategies with significant environmental effects. Confirmation has been received that a SEA is not required for this Framework Refresh.
INTRODUCTION
2.1 The national tourism strategy, *Tourism Scotland 2020*, highlights the need to secure growth through turning Scotland’s tourism assets into authentic experiences which cannot be easily replicated by Scotland’s competitors.

2.2 This refreshed Framework has been specifically framed around this strategy, placing the customer at the heart of the development strategy:

IMPROVING THE CUSTOMER JOURNEY
Theme 1 - Digital
Theme 2 - Transport
Theme 3 - Accommodation
Theme 4 - Food & Drink

PROVIDING AUTHENTIC EXPERIENCES
Theme 5 – Nature & Activities
Theme 6 – Heritage & Culture
Theme 7 – Destinations, Towns & Cities
Theme 8 - Business Events
Theme 9 - Events & Festivals
A STRATEGY FOR LEADERSHIP AND GROWTH

BY 2020, SCOTLAND IS A DESTINATION OF FIRST CHOICE...

Grow visitor spend through quality to at least £5.5bn by 2020

OUR GROWTH MARKETS
- Near Neighbours
- Home Turf
- Distant Cousins
  - Emerging Markets

PROVIDING AUTHENTIC EXPERIENCES
- Nature & Activities
- Heritage & Culture
- Destinations, Towns & Cities
- Events & Festivals
- Business Tourism

IMPROVING THE CUSTOMER JOURNEY
- Food & Drink
- Transport
- Accommodation

BUILDING OUR CAPABILITIES
- Skills
- Marketing & Intelligence
- Sustainability

LEADERSHIP & COLLABORATION
IMPROVING THE CUSTOMER JOURNEY

2.3 The quality of the customer journey is increasingly dependent on the availability of digital information.

2.4 The reliability of our broadband and mobile phone connectivity across Scotland is essential to support growth in the visitor economy. Analysis of VisitScotland’s 2015 Visitor Survey highlights a particularly strong emphasis on the need to improve digital connectivity – mobile phone signal, availability of 3G/4G, and access to free Wi-Fi.

2.5 Improvements to our digital infrastructure are necessary to support growth in the visitor economy as well as other economic sectors. Scotland’s Digital Future: Infrastructure Action Plan outlines the Scottish Government’s commitment to developing a world-class, future proofed digital infrastructure that will deliver high quality connectivity across the whole of Scotland.

2.6 The Scottish Government’s Digital Scotland Superfast Broadband programme is extending fibre broadband infrastructure to areas where the market would not otherwise go. Over £240 million of public funding is being invested through the programme which, when combined with commercial rollout, will deliver fibre broadband access to at least 95% of premises in Scotland by the end of 2017. The interim coverage target of 85% coverage by March 2016 was achieved six months ahead of schedule.

2.7 A second phase of public investment in broadband is planned, with an ambition to deliver 100% superfast coverage by 2021. The Scottish Government is currently developing delivery options with key partners and expect to launch new procurement activity later in 2016.

2.8 In parallel, the Scottish Government is developing the World-Class Infrastructure programme, which is looking beyond immediate coverage priorities and taking a longer term view of Scotland’s digital infrastructure. This work has identified the key components of 5G or ultrafast ready infrastructure and is developing strategies for supporting the delivery of these, in partnership with industry.

ACTION

Working with the Scottish Government and key public and private stakeholders involved in the delivery of the Digital Scotland strategy, VisitScotland will seek to ensure that the needs of the tourism economy are effectively catered for in all action plans.
2.9 Transport plays a vitally important role in the tourism experience. The journey to, around and from Scotland is an integral part of the overall holiday experience. For the purposes of this Framework, this element of the customer journey has been subdivided into:

Theme 2A – travelling to Scotland
Theme 2B – travelling around Scotland

2.10 Accessibility is a key driver to attracting inbound visitors and distributing them from the main transport hubs to other locations around Scotland — this is very important for ease of onward travel from point of arrival is vital. An effective road and rail infrastructure with national and international connections by air and sea is essential. As is an effective bus, Subway and active travel network.

2.11 In line with Scottish Government strategy, the underlying aim of this Framework Refresh is to encourage travel by more sustainable modes of transport. Currently, the car is still the most popular method of travel for arrival and departure in the visitor economy. This is followed closely by air but with an increasing popularity of travel by rail. Cars, buses/coaches and trains are still the most popular methods by which visitors travel around Scotland.

2.12 Investment in transport infrastructure is guided by the National Transport Strategy's three strategic outcomes (Improved journey times and connections; Reduced emissions; and Improved quality, accessibility and affordability). Investment in current transport infrastructure supports the visitor economy such as:

- Edinburgh-Glasgow Improvement Project;
- New Forth Bridge Crossing; and
- Upgrades to improve our popular scenic rail routes
- Investment in ferry vessels and infrastructure
- Investment in the bus network is substantial (circa £500 million in west of Scotland over the past ten years when capital and revenue is combined)
- Concessionary travel investment is significant and the impact of the “grey” pound has been important for day trip market
- Aberdeen Western Peripheral Route improving access to and around Aberdeen and Aberdeenshire

2.13 This theme focuses on the main arrival gateways for the visitor economy at Scotland’s airports, ports, train stations and improving the tourism value along key routes on the strategic road network, as well as tourist routes.

Buchanan Bus Station is the biggest in Scotland and an important gateway for intercity and international coach travel. References to cycling and walking along our growing path network are discussed in Theme 5.
AIRPORTS

2.14 Scotland’s international airports are an important gateway to Scotland and support the visitor economy as well as playing a strategic economic role in their regional economies.

2.15 The key requirement for our international airports is the need to maintain and secure new routes to key destinations across the aviation network.

2.16 Scottish Government continues to support route development through direct engagement with airlines and the provision of market and route analysis on the potential of the Scottish market to sustain new direct international air services.

2.17 Convenient and reliable surface access to and from our airports by a range of modes of transport is fundamental to their successful operation as well as enhancing sustainability. Glasgow Prestwick is Scotland’s only rail connected airport. Individual transport solutions, however, exist and are being enhanced for each airport.

ACTION

Working in partnership with airport operators, Transport Scotland, Regional Transport Partnerships and other stakeholders, VisitScotland will encourage a review of the accessibility of their transport interchanges to all modes of travel with the aim of improving sustainability of travel for onward journeys.
RAILWAYS

2.18 The tourism potential offered by high speed connections to England is recognised. The ambition is for a high speed rail link north to south, joining central Scotland to the planned UK network. Transport Scotland is working with The Department for Transport to ensure that Scotland is part of the UK Government’s strategy for High Speed Rail, taking account of the needs of the whole country. There requires to be a balance between internal UK wide access via rail and direct access via air.

2.19 The 7 Regional Transport Partnerships (RTPs) have, in their Regional Transport Strategy Delivery Plans, identified regional and local priorities for transport interventions which support sustainable economic growth, including supporting tourism.

2.20 Our mainline railway stations are important gateways to Scotland for our incoming visitors. The sleeper services to and from London are important tourist connections. Improved connectivity in rail links to Aberdeen and Inverness from the central belt continues to be a priority. Our mainline stations need to function as transport hubs in their own right and the ongoing upgrade of these stations is important in meeting this requirement.

PORTS

2.21 Ports are important in relation to both providing access to Scotland for visitors, as well as in supporting the ferry, cruise liner and leisure craft sectors.

2.22 Future areas of possible development need to continue to include collaboration on key national and international ferry routes. The ongoing need for a direct car ferry service to mainland Europe from Scotland continues to be highlighted as an important requirement.

2.23 Future requirements include support and improved access to and from ferry ports across Scotland as well as exploring the potential for the cruising market. The need for any infrastructure development to support the visitor economy should be considered in conjunction with other emerging investment requirements and upgrades to meet requirements such as offshore renewables.

ACTION

Working with Transport Scotland, Regional Transport Partnerships (RTPs), Network Rail, ScotRail and other stakeholders, VisitScotland will encourage improvements to mainline stations and route capacity to enhance the visitor experience and enable greater accessibility to all modes of travel.
CRUISE MARKET

2.24 The Cruise market is considered as part of the Transport Theme in this Framework Refresh because of the need to consider the onshore infrastructure necessary to provide a quality service to tourists and attract operators. The cruise market is a developing part of the Scottish tourism offering. Within this market, Scotland is seen as performing strongly in the premium end of the market.

2.25 However, a number of infrastructure and other factors are currently limiting the potential for further growth of the product within Scotland:

- Capacity and limits ashore – many rural attractions struggle to cope with the volume of passengers which would arrive en masse from a cruise ship;

- Coaches – in some locations, availability of coaches is a limiting factor on vessels over 2,000 passengers and in some cases 1,000 passengers;

- Visitor experience – instances have been identified where the number of cruise passengers landed impairs the overall experience of the destination;

2.26 To maximise the potential of this market, operations need to be at the premium end and there is a need to invest to address identified issues. Increasing the number of port calls leads to an increase in the shore excursion offerings and profile destinations. Planning and co-ordination between these cruise destinations is an essential part of developing this market. Greater flexibility in terms of size of ports can greatly increase footfall (e.g. smaller cruise vessels will be able to access the likes of Brodick (new facility), Oban, Stornoway, Orkney/Shetland).

ACTION

Working in partnership with Cruise Scotland, VisitScotland, will examine the future of the cruise market for Scotland and identify infrastructure investment priorities for action to grow this market.
AIR SERVICES
2.27 Our internal domestic flights around Scotland are important to the social and economic welfare of the areas they serve especially air services in the Highlands and Islands.

ACTION
Working in partnership with airport operators, airlines, Regional Transport Partnerships, national and local stakeholders, VisitScotland will focus on investment/infrastructure needs to help enhance domestic flight experiences.

FERRY SERVICES
2.28 Ferries operating within Scotland are an essential part of Scotland’s transport network. They perform several roles including contributing to the sustainability of our more remote communities through tourism.

2.29 Transport Scotland has now published the Scottish Ferry Services: Ferries Plan (2013 - 2022) which sets out the future of ferry services until 2022. Enhancing the take-up of Scotland’s ferry services and related infrastructure are key to supporting business and employment opportunities generally as well as the visitor economy. RET has impacted on car deck space availability on some of the more popular islands – this could have a negative impact on coach tour and/or independent tourist travellers to the islands given potential capacity issues.

ACTION
Working in partnership with Ferry operators, Transport Scotland, Regional Transport Partnerships and other national and local stakeholders, VisitScotland will consider measures to improve the quality of the visitor experience for ferry passengers.
RAILWAY SERVICES

2.30 Scotland’s rail network has 350 railway stations and over 2,700 kilometres of track. There are a number of ongoing and planned projects which will benefit both commuters and the tourist/visitor economy. The East Coast, West Coast and Cross-Country cross-border rail services are important for long distance, leisure and tourism travel.

2.31 The new ScotRail franchise includes a number of commitments which will further enhance the experience for tourists at stations and on specific routes.

2.32 More than one third of ScotRail travel can be attributed to tourism (whether domestic or overseas) and some 25M to 30M passenger journeys are made on leisure trips. More than half of ScotRail’s customers (52%) are defined as being short and long distance leisure trips.

ACTION
Working with Transport Scotland, Regional Transport Partnerships (RTPs), Network Rail, ScotRail and other stakeholders, VisitScotland will consider measures to improve the quality of the visitor experience for rail passengers.

ROAD NETWORK

2.33 Nearly one third of the 14.7M people who visit Scotland enjoy touring our country. The trunk road network is the Scottish Ministers single biggest asset, connecting cities, towns, airports and ports enabling the movement of people goods and services. The network is hugely diverse, ranging from the ten-lane M8 in the centre of Glasgow to single carriageway sections in the west Highlands.

2.34 Scotland’s trunk roads pass through areas outstanding in wildlife and landscape terms and of national or international importance, including Scotland’s two National Parks, Loch Lomond and The Trossachs and Cairngorms National Park - Britain’s largest National Park. Transport Scotland considers the A9, A82, A83 and A75 as routes with a particular tourism focus. There are a number of signposted National Tourist Routes identified as an alternative choice to travelling on the trunk road network.

2.35 Continuing investment to maintain and improve our roads is essential and preparation is underway to take forward a number of schemes, either in the near future or when funding is available, which will enhance these key tourist routes.

2.36 Upgrades to routes with tourism potential need to consider a wide range of factors to maximise benefit to the visitor economy including ease of connectivity (and signage) to tourist destinations; opportunities to incorporate vistas in route design and stopping places along the route to take advantage of scenic views. Scottish Transport Appraisal Guidance (STAG) appraises investment decisions but there is a further opportunity to take matters into account through Design Statements for route infrastructure improvements.
2.37 Councils along with the Regional Transport Partnerships and Transport Scotland are addressing the need for ongoing improvements required to the national, regional and local road network supporting the visitor economy.

**ACTION**
Working in partnership with Transport Scotland, Regional Transport Partnerships (RTPs) and partner councils, and other stakeholders, VisitScotland will encourage the prioritisation of interventions to improve connectivity along strategic visitor routes.

Working in partnership with Transport Scotland, Regional Transport Partnerships (RTPs) and partner councils, and other stakeholders, VisitScotland will encourage the development of a series of scenic tourist routes throughout Scotland.

**COACH AND BUS SERVICES**

2.38 Transport Scotland sets the national policy framework on buses which is delivered by bus operators, local authorities, Regional Transport Partnerships and the regulatory authorities. The majority of bus services in Scotland are operated on a commercial basis by private bus companies. Bus services to/from our gateways and transport hubs, are essential in supporting the visitor economy. This sector plays an increasingly important role in sustainably transporting day visitors and tourists to attractions and destinations around Scotland.

2.39 Key to a successful journey is the need for the right infrastructure to allow passengers to be collected and disembark safely. Essential infrastructure for coach operators at a local scale is still needed for collection and disembarkation along with designated safe and secure layover parking in many of our tourist destinations.
Accommodation is one of the main drivers of tourism revenue. Scotland’s tourist accommodation supply, particularly at the higher end of the market, helps support the growth of the visitor economy.

AM:PM, a Scottish based hotel data and intelligence company, using their extensive knowledge of the Scottish hotels market have noted:

“There are clear patterns/trends evident between where hotels are closing, where current supply density is greater and where active pipeline is distributed. Rural/non-urban operators continue to face significant challenges which restrict their investment and capacity. Combined with smaller average size, older property age and challenges of attracting staff, closures are greatest in this area.”

“When you combine the loss of hotels with new supply trends there is a long term trend that is unlikely to reverse if left purely to the private sector and this is one of greater brand penetration and urbanisation.”

ongoing investment in Scotland’s tourist accommodation product from the private sector is therefore imperative to ensure that the product quality expectations of visitors are met going forward. Accepting the need for more, higher quality accommodation, and noting the constraints imposed by current economic conditions, the overall strategy also needs to incorporate 5 star quality experiences for the budget traveller without the need to stay in 4 – 5 star accommodation.

The analysis of visitors’ wants and needs from VisitScotland’s 2015 Visitor Survey highlights that, in particular, investment opportunities and requirements exist around:
• Improving the quality of existing accommodation which will help to drive up occupancy levels and provide higher yields for tourism businesses; and

• Investing in new accommodation provision from quality budget hotels to high end luxury resorts, which can attract new visitors to Scotland.

2.44 Glasgow, and Edinburgh have seen significant levels of investment in new accommodation in recent years, with further commitments in the pipeline. There are still challenges around some brands operating under a management contract only which has meant that whilst they are interested in Scotland, they are unable to identify a development site/developer to suit this delivery model.

2.45 There is still a requirement in Edinburgh and Glasgow to provide luxury and upper upscale accommodation, respectively, to support both business and leisure tourism demands. Aberdeen has issues with oversupply following the impact of the low oil prices, whilst Dundee is attracting hotel interest due to the regeneration of Dundee Waterfront and the arrival of the V&A. Opportunities also exist for further investment in niche accommodation, including serviced apartments and new boutique and lifestyle hotels. These can meet the needs of the business traveller and provide for the short break, international and affluent mature domestic market.

2.46 Additionally, the cities of Perth, Stirling and Inverness are looking to attract further hotel development to meet demand. Inverness, in particular has witnessed impressive hotel performance growth in recent years in both occupancy and revenue per available room (RevPAR).

2.47 Whilst the cities have seen a growth in new bedroom provision, rural locations and small towns have struggled to attract investment. This has been highlighted as a barrier to the future growth of tourism in these areas in the consultation responses. Consequently, it acts as a constraint on those expanding outdoor experiences, such as walking, mountain biking, wildlife watching and other niche markets which rely on the rural product.

2.48 Significant investment has been made in recent years on the west side of Loch Lomond in hotel accommodation, but further opportunities remain around the south of the Loch at the gateway to the National Park, as well as further north in the Cairngorms National Park.

2.49 Particular gaps have been highlighted in accommodation around such ‘honey pot’ locations as St Andrews, Fort William, Inverness, Oban, Ullapool, Skye, Outer Hebrides, Shetland and Perthshire. These include hotels for groups and coach parties, independent country house hotels and high quality self catering developments. There is a need for a full network of hotels offering value and quality across Scotland which meet the needs of touring groups based on market demand.
2.50 The country house hotel, for so long a significant generator of short break tourism to Scotland is under pressure. It needs to evolve its experience to meet the changing needs of customers and move towards a more financially viable and hence sustainable business investment model.

2.51 Across Scotland, there is a need to consider the potential opportunities for future hotels close to existing visitor attractions. Some hotels may be conversions or redevelopment of existing buildings. Some may form part of an overall regeneration of an area. Where possible, proposals for new accommodation should form part of a wider mixed use development, maximising the opportunity for enabling development to cross fund the tourism project.

2.52 Holiday home and touring caravan parks are important largely for the UK tourism market in terms of the volume of rural tourism bed spaces they provide and the economic benefits that flow from this scale of tourism activity. These parks may offer a range of accommodation, as well as a diverse range of infrastructure and amenity provision. Many holiday and touring parks recognise the need to upgrade to improve quality to meet customer demands. Raising finance for this investment may require the need to expand the park to help support any upgrade.

2.53 Self-catering tourist accommodation in the countryside is by and large well provided for throughout Scotland with some gaps at the higher quality end of the market.

**ACTION**

In partnership with local and national stakeholders, VisitScotland encourages development planning authorities to consider further accommodation requirements at locations where there is evidence of market demand including the upgrade or expansion of existing hotels. Specific priorities include:

- Identifying locations for investment in new hotels in city centre locations around major conferences which will also support business tourism;
- Identifying locations for investment in new hotel accommodation in towns and rural areas, including the country house hotel product; and
- Setting policy to encourage investment in other forms of holiday accommodation in rural areas such as new self-catering accommodation (where deficiencies are identified), bunkhouse provision, holiday parks and novel low carbon development.

**RESORT DEVELOPMENT**

2.54 Resorts are defined in this Framework Refresh as being destinations where a collection of activities, such as eating, sleeping and recreation, can be undertaken in one defined location. Golf has been central to the development of the resort experience across Scotland and with its overall quality and history remains one of the core activities to attract visitors.

2.55 Resort development offers significant economic opportunities to Scotland as a result of the employment which they create, especially welcome in rural areas. The off-site spend and supply chain which they support and the nature of visitor which they attract is also important.

2.56 Resorts can be located in an urban or rural setting depending on the market being served. Resorts tend to depend on the quality of the surrounding environment for locational choice. However, in certain circumstances a resort has the potential to extend over a much wider area, sharing a common brand.

2.57 New resorts need to be sensitively and sustainably located to benefit the visitor economy and avoid damaging the character of the asset. Influencing factors to attract
investment include aspects such as high quality scenic value, heritage value, image and customer awareness, a mix of markets and relatively easy access to international and domestic airports and to rail, road and ferry infrastructure.

2.58 Sites near to designations such as World Heritage Sites or National Nature Reserves are possible locations for resorts. This could include National Parks, National Scenic Areas and Biosphere reserves. Early dialogue informed by partnership working with all relevant stakeholders especially Scottish Natural Heritage and Historic Scotland is supported prior to considering allocating sites in the local development plan.

Opportunities for resorts may arise where appropriate estates or mansions come to the market. Forestry Commission Scotland and other estates may have opportunities to further develop forest tourism through the resort model. Scotland’s existing resorts will benefit from ongoing development and expansion. This together with the promotion of the wider tourism resources in their locality needs to be explored and opportunities identified in the emerging development plans.

**ACTION**

Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to identify areas for urban and rural resorts in their development plans based on market demand.
2.59 The Food & Drink sector is fully acknowledged as a key part of the Tourism Scotland 2020 strategy. Its quality and image is inextricably linked with our natural environment and heritage. In Scotland, current visitor spend on food and drink represents about 20% of all tourism expenditure, approximately £850M per annum.

2.60 Our produce has enabled a speciality retail market to be developed across Scotland located in our popular tourist destinations. There is scope to continue to further develop speciality retailing as part of the infrastructure of the visitor economy.

2.61 Visitor research by VisitScotland in 2015 highlights that, along with accommodation, visitors felt that improvement of the quality of their food experience in Scotland improves their overall visitor experience.

2.62 The ongoing promotion of festivals promoting local produce and drinks continue to gain in popularity along with more local events such as farmers markets. Investment in public realm infrastructure is important in creating an attractive environment for existing or new food and drink retail outlets to present their produce.

2.63 Many areas across Scotland will find it difficult to affect a growth step change if they do not develop and support quality catering outlets, at all pricing levels. Investment in local or regional quality catering provision particularly in Scotland’s conference, exhibitions and events sectors is vital to the ongoing growth and support of this sector.

**ACTION**

The local representation of food and drink should be an integral part of future tourism development strategies and in the context of the Framework Refresh, any supporting infrastructure.
Scotland boasts some of the best countryside in the world. Scotland’s nature and landscapes are highly valued assets – important to our communities and those who visit Scotland. VisitScotland’s surveys confirm that it is the single most important factor in attracting our visitors.

Many of Scotland’s landscapes are protected by a diverse range of natural heritage designations such as National parks; National Nature Reserves; National Scenic Areas as well as local places such as Regional Parks and Local Nature Reserves. The overall aim to support growth in the visitor economy is to provide greater access to these special places. Securing appropriate development opportunities within these special places must demonstrate that any change maintains their special characteristics.

Scotland has world class access legislation which provides for public access to most land and water. These access rights are highly valued by visitors and tourists and the right of access creates assets for the visitor economy. The provision and maintenance of these rights requires ongoing capital and revenue finding from the public sector as well as active support from landowners and land managers.

Scotland has a wonderful and diverse range of paths and trails to be enjoyed by walkers and cyclists including Scotland’s Great Trails (SGTs); the National Cycle Network (NCN); local path networks and core paths; and hill tracks and rights of way. The development of the National Walking and Cycle Network will further develop the national dimension of this resource, focusing future effort onto developing greater connectivity of the SGTs, NCN and the path network of Scottish Canals.
2.69 Many routes have been developed at a local level, providing core paths and routes which are particularly important in extending the visitor experience and visitor stay within towns. The extent and geographic coverage of our path network is now an opportunity to further develop themes such as pilgrimage routes and other heritage trails.

2.70 Forestry Commission Scotland (FCS) manages around 1,200km of marked multiuse trails and 1,300km of cycling/mountain bike trails. FCS continues to maintain its path and trail network on its substantial land holdings across Scotland: with wider benefits for the development and contribution to the visitor economy.

2.71 The extent and coverage of the path, trail and route network allows supporting infrastructure to follow. Such investments take the basic asset of our natural environment and provide means to access the outdoors in a more sustainable way and create opportunities to establish business ventures. These provide opportunities for longer stays to be built around our countryside offering.

**FOREST TOURISM**

2.72 Forest recreation and tourism overall is worth over £183M to the Scottish economy, supporting more than 6,300 jobs (Economic Contribution of forestry, Nov 2015). within that, over 9 million visitors annually come to Scotland’s national forest estate alone, supporting over 3,700 jobs and worth around £110M in GVA (Economic contribution of the national forest estate, Dec 2015).

2.73 Scotland’s forests and woodlands extend to around 1.5M hectares of land. The national forest estate, managed by Forestry Commission Scotland is around 630,000ha, of which 477,000ha is wooded. Many businesses, organisations and individuals manage Scotland’s woodland and there are opportunities to invest in upgrades or new facilities. Forest tourism supports many activities and motorsports, orienteering, mountain biking, dog sports, triathlons, and festivals are some of the events held in Scotland’s forests and woodlands.

2.74 Other land managers involved in forest tourism include the National Trust for Scotland, Scottish Natural Heritage, RSPB Scotland, Scottish Wildlife Trust, and many other large estates as well as councils across Scotland. Development opportunities are being progressed in these estates to expand and diversify their businesses.

**ACTION**

Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the development opportunities along our designated path network to enhance their tourism potential.
SCOTLAND’S MARINE ENVIRONMENT

2.75 The context for all matters relating to the protection, planning and development of Scotland’s Marine Environment is encapsulated in the Scottish Government’s National Marine Plan (2015).

2.76 Within the plan there is a separate and distinct section that outlines the objectives and policies for the recreation and tourism sectors.

2.77 In support of the National Marine Plan, a strategic framework for Scotland’s Marine Tourism Sector – ‘Awakening the Giant’ was published in March 2015.

2.78 This Framework highlights the fact that Scotland’s marine tourism industry is worth and estimated £360million with sailing and boating alone generating over £101Million of visitor expenditure and directly supporting 2730 jobs.

2.79 Under the theme of “Building our Capabilities”, within the Framework specific actions are identified to; map and identify critical infrastructure or capacity gaps, target investment to develop a high quality set of stepping stone facilities and influence developments to ensure facilities are created to match customer expectations.

ACTION
Working in partnership with Marine Scotland, regional marine planning partnerships, and the various stakeholders responsible for delivering the “Awakening the Giant” framework, VisitScotland will encourage development planning authorities to examine the tourism potential around our coasts and seas and consider the promotion of marine based development strategies in local development and regional marine plans.

SCOTLAND’S CANALS

2.80 Scottish Canals is responsible for the management of the Caledonian, Crinan, Forth & Clyde, Union and Monkland Canals. Working in partnerships with stakeholders and local communities, Scottish Canals is planning ventures with the private sector and other investors to deliver proposals within what is unquestionably some of Scotland’s most exciting and scenic areas.

2.81 Its development strategy is based on creating destinations in key locations across Scotland including major city centres e.g. the new canal quarter at Edinburgh Quay, major regeneration projects such as The Falkirk Wheel and The Helix as well as developments at Highland tourist locations.

2.82 More marinas are planned for the Canals together with an expansion of towpath tourism and better holiday accommodation. Opportunities include commercial, residential, leisure and water based schemes ranging from small developments to major regeneration projects.

ACTION
Working in partnership with Scottish Canals and other local and national stakeholders, VisitScotland encourages development planning authorities to continue to promote the tourism potential of our canals and waterways and consider the allocation of suitable sites in local development plans.

SCOTLAND’S OUTDOOR ACTIVITIES

SNOW SPORTS

2.83 Skiing and snowboarding have long been popular in the Highlands at Cairngorm Mountain, Nevis Range, Glencoe Mountain, Glenshee and Lecht, and are core to our outdoor activities and experiences in Scotland.

2.84 Snow sports have helped establish vibrant centres which now support a greater range of activities outwith the snow
season. This is a good example of a flexible development model which establishes a core location for the outdoor activity, and creates a base for other outdoor activities to co-locate to maximise demand and extend the season.

**ACTION**

Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider and where appropriate include in their development plans the upgrade of supporting infrastructure at snow resorts where it meets the wider tourism market.

**GOLF**

2.85 According to research published in 2013, the golf industry generates £1.171 billion in revenues to Scotland with golf tourism generating £120 million and directly employing 1480 people.

2.86 There are currently more than 600 golf facilities in Scotland, of which 597 are golf courses, many with international appeal. Many contribute to a supporting element of the overall golf experience, offering an authentic Scottish golf experience away from the well-known venues.

2.87 Building on the positioning as the Home of Golf, Scotland has the potential with the right investment to compete internationally, offering a very high quality experience in the recognised golf destinations such as St Andrews, Aberdeenshire, Ayrshire including Arran, Angus and East Lothian, as well as growing interest in parts of the Highlands and the Islands.

2.88 Golf can be central to a wider resort experience, helping secure investment in 4 and 5 star hotel accommodation, as well as a range of other accommodation options highlighted in this Framework.

**CYCLE TOURISM**

2.89 According to a report published in June 2013 – “The value of Cycle Tourism” – the combined value of mountain biking and leisure cycle tourism sectors to Scotland is estimated to be between £236 million and £358 million per annum.

2.90 For Leisure Cycling The National Cycle Network in Scotland is co-ordinated by Sustrans but a significant proportion of the network is maintained by councils. Across Scotland, there are 2,100 miles of the National Cycle Network, including over 500 miles of traffic-free walking and cycling routes. Many of these routes have the potential to be linked into other tourism initiatives, maximising business opportunities. Sustrans and a number of the RTPs have jointly appointed dedicated officers to support strategic development of Active Travel networks and capacity regionally and working with local communities.

2.91 Along the National Cycling Network, cyclists need specialist support facilities from accommodation providers such as secure bike storage, drying rooms and bike washing and as part of their journey, ease of access to take bicycles onto trains and buses.

2.92 Scotland is recognised as a world class venue for mountain biking. The investments which have been made in mountain biking infrastructure in recent years provide an example of where Scotland can now compete internationally and attract markets which previously would not have considered Scotland.
A National Strategic Framework (The Sustainable Development of Mountain Biking in Scotland 2009) has been produced by a number of agencies with an interest in mountain biking.

This Strategic Framework seeks to create a series of local mountain bike development clusters. These will be broad geographic areas with greatest potential to safeguard and improve existing provision and identify opportunities which deliver future needs at an optimum economic return in terms of visitor numbers.

Further potential exists to support the international appeal of Scotland to the mountain biking community. As well as continued investment in track provision and maintenance, there are investment opportunities around supporting infrastructure such as visitor centres, specialist retail, catering and accommodation.

ACTION
Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the potential for and upgrade of cycling infrastructure facilities to meet the wider tourism market.

WILDLIFE TOURISM
2.98 Wildlife tourism is an increasingly important activity for visitors to many parts of Scotland and is worth £276M to the Scottish Economy. It is a diverse sector, responding to our abundant range of wildlife and habitats and benefits from world class settings to enjoy wildlife on land, at sea or along the coast.

2.99 According to the Economic Impact of Wildlife Tourism in Scotland (Bournemouth University 2010), there are over 1M wildlife trips annually to or within Scotland where this is the primary purpose. In reality the scope of wildlife tourism is greater. It is an expanding market. It provides business opportunities associated with species or a combination of species in particular habitats.

2.100 Any development in wildlife tourism needs to take into account local wildlife sensibilities and already existing pressures. New developments should also always ensure best practice in terms of wildlife watching.

COUNTRY SPORTS TOURISM
2.96 The country and field sports across many rural estates are internationally important and contribute £200M to the visitor economy. Scotland is known as a mature sporting destination that offers outstanding experiences amongst stunning and dramatic landscapes.

2.97 Scotland offers great choices from salmon on world renowned rivers such as the Tweed, Tay, Dee and Spey to red deer stag stalking, sporting bird and other country pursuits, as well as coarse and sea angling.
Nature Reserves are important places for Wildlife Tourism. Recent investment has been made in these assets (Flows; Loch Leven Heritage Trail; Isle of May visitor centre; creation of new Great Trossachs Forest NNR).  

**ACTION**  
Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the potential for and upgrade of facilities for wildlife tourism to meet the wider tourism market.  

**EMERGING NICHE MARKETS**  
**2.102** Outdoor activities continue to be a developing and diverse market with niche opportunities constantly emerging. The potential arising from the designation of the Galloway and Southern Ayrshire Biosphere Reserve and Dark Sky Park is an important example. Geotourism in the two Scottish Geoparks of North West Highlands and Shetland show how international designations can foster new opportunities to help develop opportunities serving these specialist markets.  

**2.103** Whilst the relative economic impact of these niche markets may be minor in the early years, they can play an important part in the diversity of the tourism economy for many rural areas. These minority activities can be strengthened over time and potentially developed to provide Scotland with opportunities to compete for international events which can then boost the wider profile of the destination and help grow its supporting infrastructure.  

**SCOTLAND’S NATIONAL PARKS**  
**2.104** Scotland has two National Parks, Loch Lomond and The Trossachs and the Cairngorms.  

**2.105** The quality of the natural landscape within each of the National Parks is without question. The challenge is in providing a quality of accommodation, built environment and general tourism infrastructure to meet visitors’ expectations which maximises the economic value to Scotland of these two internationally renowned assets.  

**2.106** There are opportunities for further resort development within each Park. It is recognised that there is also an ongoing need for investment in public realm in the key settlements and a requirement for supporting tourism infrastructure.  

**2.107** Both National Park Authorities continue to develop a proactive approach in their development plans to accommodate sustainable developments in their respective areas. Both Authorities provide exemplar development policy frameworks and approaches on how to plan for the visitor economy.  

**ACTION**  
VisitScotland along with other local and national stakeholders will work in partnership with both National Park Authorities to promote growth in their visitor economies in their development plans.
The “People Make Heritage – Heritage Tourism 2020” Strategy identifies the following 3 pillars of Scotland’s Heritage and Culture (See opposite page).

Most of the country’s designated sites currently have a visitor and tourism interface with some being major players in attracting visitors to Scotland. Others provide the backdrop to visitor experiences and days out and are often key features of the scenery and landscapes which characterise the different regions of Scotland.


Heritage Tourism is worth £1.34billion (2013) and the strategy has set a target to grow that to £1.7 – £1.95 billion by 2020.

Given the significance of Scotland’s history and heritage as a major attraction for tourists, it is important that levels of investment are maintained by those responsible for the restoration, refurbishment and maintenance of Scotland’s historic built environment at a national and local level.

In addition to investing in the core asset or attraction, it is also important to ensure that supporting aspects also reflect the overall quality which our visitors experience. This includes catering, retail and hospitality outlets as well as elements such as signage, access and interpretation. Factoring in tourism and visitor facilities where necessary along with supporting infrastructure should be an integral part of proposals for the regeneration and expansion of villages, towns or cities where the visitor experience can be improved.

ACTION
Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the regeneration potential from expansion of tourism/visitor infrastructure in support of successful heritage and culture assets in their development plans based on evidence of market demand.
MAINTAINING AND ENHANCING OUR PUBLIC REALM
2.114 Our historic villages, towns and cities draw visitors who come to experience our culture and sample an authentic experience.

2.115 In order to remain competitive, it is vital that the quality of our natural environment is mirrored in the quality of our built environment within those villages, towns and cities which attract visitors. As well as the ongoing conservation of our heritage, there is a need to consider the overall visitor experience which is offered.

2.116 This investment in public realm is generally led by the public sector. This type of investment, particularly at the major gateways to Scotland and our tourism hot spots is critical to Scotland competing internationally both for visitors and for wider investment into the economy.

TOWNS & CITIES
2.117 There is an increasing need to focus on improvements to the public realm in our city and town centres to combat the challenges arising from the changing nature of shopping. Funding mechanisms need to continue to evolve to ensure that the place attractiveness of Scotland continues to be delivered.

2.118 In recognition of the key roles cities and their regions play in the economy of Scotland, Governments (UK and Scottish) have developed city deals to support public infrastructure development works that will generate additional economic activity.

2.119 At present within Scotland seven City Deals are at various stages of development, approval or implementation.

2.120 The Glasgow and Clyde Valley City Deal agreed in August 2014 includes a £1.31billion infrastructure investment fund to enhance transport infrastructure, unlock new development sites and improves public transport over the next 10 – 20 years.

In January 2016 a City Deal for Aberdeen was agreed which will cover £500million invested over the next 10 years in improved transport and digital connectivity.

The Inverness City Region Deal was agreed in March 2016 and sees up to £315million invested in infrastructure over the next 10 years.

Proposals are being developed to create similar deals for Edinburgh and the South East, Tay cities and Stirling.

ACTION
VisitScotland, working in partnership with local and national stakeholders will encourage the improvement of the public realm at our transport gateways and in our main tourist destinations through innovative use of BID and City Deal funding.
The business events sector is a highly competitive and discerning market. Competitor destinations, domestically and internationally, are undertaking significant investments in upgrading existing venues as well as developing new venues and offerings. Scotland has seen some significant recent investment and new product coming into the market.

There has also been significant renovations and improvements to key resort hotels. Continued investment is needed in this sector by both private and public sectors in order to enhance and maintain Scotland’s competitiveness.

The requirement by organisers for facilities to be accessible supports the need for existing conference locations to be served by improved access to our international airports.

Direct air connectivity is important to the international business event sector, with long lead times and the set dates of delegate travellers being a potential source of route sustainability. The new direct routes to Scotland from the Middle East and increased access from North America are essential to appealing to the global association and incentive market. Connectivity to Europe, whilst frequent, suffers from a lack of capacity and availability for business events groups and needs addressed as part of wider route development.

The development of appropriate hotel stock in key destinations is a strategic issue for the business events sector. Throughout Scotland, the shortage of hotels offering accommodation in excess of 300 rooms is an impediment to growth in corporate and association conferences. Subject to identified market demand there are opportunities for quality 4 star and 3 star accommodation.

Investment in new accommodation, as well as upgrading of existing supply, enables Scotland to maximise existing and future opportunities in this sector. Scotland also has an opportunity to redress the current mismatch between the availability of existing conference facilities and accommodation supply. The scale of quality accommodation outside of Edinburgh and Glasgow is limited.

The thrust is to focus on supporting the expansion of existing venues and destination resorts as gateways in order to support conferences and exhibitions of scale. New or expanded conference, exhibition and event infrastructure requires the suitability of existing sites to be reviewed in emerging development plans to ensure a co-ordinated approach to their future investment and delivery.

**ACTION**

Development planning authorities, in conjunction with other local and national stakeholders, are encouraged by VisitScotland to consider the potential for expansion in existing conference, exhibition and event locations through their development plans based on evidence of market demand, including a strategic review of hotel provision required to support the business events sector.
Theme 9 - Events & Festivals

2.127 “Scotland the Perfect Stage – Scotland’s Events Strategy 2015 – 2025”, has as its mission “to develop through a one Scotland approach a strong and dynamic events industry programme, producing a portfolio of events and festivals that delivers sustainable impact and international profile for Scotland”.

2.128 Events and festivals are core to developing growth in the visitor economy and supporting development strategies to help sustain or enhance visitor interest, extend the season or promote interest in particular locations.

2.129 The Perfect Stage strategy identifies 3 key areas relating to infrastructure and services that are already covered elsewhere in this Framework but that are worthy of specific mention.

2.130 These are transport connectivity, the availability of Wi-Fi broadband and the need to increase both the stock and quality of accommodation in key locations near to major event venues.

ACTION
VisitScotland encourages development planning authorities, together with other local and national stakeholders, to consider infrastructure requirements for an events and festival programme underpinning local tourism development strategies.
INTRODUCTION
3.1 This document provides a broad framework within which tourism development opportunities can be promoted and supported at local level.

3.2 It encourages planning authorities to consider formulating a special strategy at the local level focused on the visitor economy based around the visitor journey.

3.3 A starting point for this exercise is outlined in Appendix I which details projects which will contribute to enhancing the visitor experience and which will either commence, progress or be complete over the 3 year life cycle of the Framework.

ACTION
VisitScotland, using its extensive supply and demand research data, will work with local authorities to assist in developing local visitor economy strategies and development plans. (An initial pilot project involving 2 contrasting locations in Scotland is planned to test this methodology).

OUTCOMES FROM THE PLANNING SYSTEM
3.4 A wide range of public and private sector agencies are responsible for the effective delivery of projects outlined in this document.

3.5 VisitScotland recognises the benefits that can be gained in collaboration over the coordination of investment plans across all the local and national stakeholders involved in the development of Scottish Tourism.

3.6 VisitScotland would like planning authorities to consider whether the local visitor economy and its tourism development opportunities are a ‘main issue’ at an early stage of a development plans preparation and to engage with as many stakeholders as possible in this action.

3.7 Adopting the template of the customer journey and creating spatial guidance provides greater certainty for investors and developers in the development management process.

MONITORING THE FRAMEWORK
3.8 A monitoring report will be produced in June 2018 and will record the progress made regarding both the delivery of projects outlined in Appendix I and the creation of local visitor economy development plans.

3.9 The Framework will be reviewed and updated every 3 years to help inform and guide investment in tourism priorities. This version represents the first refresh of the original Framework published in June 2013.
VisitScotland has published this framework refresh in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any errors or omissions.

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